WHAT IS CLAIMED IS:

1.   A computer assisted method for providing for assisting in providing configuration and
sales information for the development of insurance plans for a customer, the method
comprising:

   collecting customer data within a sales computer system;

   storing the customer data within a database on the sales computer system;

   presenting a description of the insurance plan options available based upon the
customer data;

   selecting a preferred set of insurance plans from the available insurance plan options
and determining an estimated cost for the preferred set of insurance plans; and

   generating a customized proposal for the preferred set of insurance plans, including
the customer data, the description of the preferred insurance plans, and the estimated costs for
the preferred set of insurance plans.

2.   The method according to claim 1, wherein the method further comprises printing the
customized proposal.

3.   The method according to claim 2, wherein the method further comprises providing
insurance company data, insurance application forms, benefit charts data, and provider
information data as part of the proposal.

4.   The method according to claim 3, wherein the proposal data is provided is electronic
form.

5.   The method according to claim 3, wherein the proposal data is provided is paper
form.

6.   The method according to claim 1, wherein the presenting a description of the
insurance plan options comprises determining if an offered plan is available to the customer
based upon other plans selected as part of the preferred set of insurance plans as well as the
customer data.

1　7.　The method according to claim 6, wherein presenting a description of the insurance

2　plan options further comprises:

3　　　presenting an indication that a plan may be offered but is not currently available to the

4　customer based upon other plans selected as part of the preferred set of insurance plans as

5　well as the customer data; and

6　　　presenting an indication what conditions are not met for the customer to qualify for

7　the offered but currently not available insurance plan.

1　8.　The method according to claim 7, wherein selecting a preferred set of insurance plans

2　from the available insurance plan options comprises:

3　　　selecting one or more sets of possible insurance plans from the available insurance

4　plan options;

5　　　determining an estimated cost for each of the possible sets of insurance plans; and

6　　　generating a customized comparison for the possible set of insurance plans, including

7　the customer data, the description of the preferred insurance plans, and the estimated costs for

8　the preferred set of insurance plans.

1　9.　The method according to claim 8, wherein the available insurance plan options

2　comprise a plurality of health insurance plans, a plurality of dental insurance plans, a

3　plurality of life insurance plans, and a plurality of disability insurance plans.

1　10.　The method according to claim 9, wherein application data corresponding to the

2　preferred set of insurance plans are transmitted from the sales computer system to a remote

3　server system for processing of the request for insurance.

1　11.　A computer-readable medium having computer-executable instructions for the

2　method recited in claim 1.

1　12.　A computer-readable medium having computer-executable instructions for the

2　method recited in claim 10.

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1   13.   A computer data signal embodied in a carrier wave readable by a computing system

2   and encoding a computer program of instructions for executing a computer process

3   performing the method recited in claim 1.

1   14.   A computer data signal embodied in a carrier wave readable by a computing system

2   and encoding a computer program of instructions for executing a computer process

3   performing the method recited in claim 10.

1   15.   An insurance sales and configuration system for providing a system to assist in

2   providing configuration and sales information for the development of insurance plans to a

3   customer, comprising:

4   a transportable sales computing system having a customer data input module for

5   accepting customer data, a sales tool module, an insurance plan database, a plan

6   configuration engine module, and a proposal generator module;

7   a communication connection to a server computing system for providing application

8   data from the customer and for receiving status and database updates;

9   an information and proposal output module for providing insurance information to the

10   customer.

1   16.   The system according to claim 15, wherein the output module is selected from the set

2   of output devices including: a visual display device, a printer, and an electronic file transfer

3   means.

1   17.   The system according to claim 15, wherein customer data includes company data, key

2   contact data, employee census data, affiliate company data, and salesperson notes.

1   18.   The system according to claim 15, wherein the insurance plan database includes a

2   plurality of offered insurance plans, a set of cost data for the offered insurance plans, the

3   requirements for the offered insurance plans, and a description of the offered insurance plans.

1   19.   The system according to claim 15, wherein the proposal generator module generates a

2   comparison of two or more offered insurance plans that the customer is qualified to purchase

3   based upon the customer data and the insurance plan database.